

2023 Vehicle Technologies
Annual Merit Review
June 12–15, 2023

Guidelines and Slide Examples
Technology Integration (TI) Presentations

Table of Contents

Changes at a Glance for 2023	<u>5</u>
Submission Deadline	<u>6</u>
Legal Indemnification	<u>7</u>
General Guidance and Instructions	
Creating and Naming Your Presentation Files	<u>8</u>
Overall Presentation Structure	<u>9</u>
Formatting Your Presentation	<u>10</u>
Adding Images to Your Presentation	<u>12</u>
Animations and Videos	<u>13</u>
Content Restrictions	<u>14</u>
Copyright Restrictions	<u>15</u>
Use of Logos	<u>16</u>
30- Minute Recommended Slide Order	<u>17</u>
15- Minute Recommended Slide Order	<u>18</u>

Table of Contents (Continued)

Preparing Your PowerPoint for Web Publication/PDF	<u>19</u>
Adding Alt Text to Your Presentation	<u>20</u>
Adding Presentation Detail Information	<u>22</u>
Creating Final Version of Your Presentation	<u>23</u>
Creating PDF Version of Your Presentation	<u>24</u>
Verifying PDF File	<u>25</u>
Submitting Your Presentation	<u>26</u>
Presenting at the AMR	
Oral Presentations	<u>27</u>
Presentation Time Limits	<u>28</u>
Late Information Addition	<u>29</u>
TI Review Criteria	<u>30</u>

Table of Contents (Continued)

Slide Instructions and Examples	
Slide Titles and Key Results	<u>31</u>
Instructions for Specific Slides	<u>32</u>
Title Slide	<u>33</u>
Overview	<u>36</u>
Project Objectives	<u>39</u>
Project Approach	<u>41</u>
Milestones	<u>43</u>
Project Accomplishments and Progress	<u>45</u>
Collaborations	<u>48</u>
Contributions to Energy Equity and Environmental Justice	<u>50</u>
Summary	<u>52</u>
Technical Backup	<u>54</u>
Reviewer-Only Slides	<u>55</u>
Publications and Presentations	<u>56</u>
Critical Assumptions and Issues	<u>57</u>
Contact Us	<u>58</u>

Changes at a Glance for 2023

- All oral presentations and posters must be uploaded through [this Google Form](#) no later than **APRIL 14, 2023**.
- The AMR will be virtual.
- Please use a 16:9 aspect ratio for your slides.

Submission Deadline

Presentations and posters must be uploaded through [this Google Form](#) no later than

APRIL 14, 2023.

No exceptions.

Legal Indemnification

FOR INFORMATION ONLY. **DO NOT INCLUDE IN PRESENTATION.**

By submitting a presentation file to Oak Ridge Institute for Science and Education (ORISE) for use at the U.S. Department of Energy's (DOE's) Vehicle Technologies Office Annual Merit Review Meeting and to be provided as hand-out materials, and posting on the DOE's website, except for employees of the Federal Government and DOE laboratory managing and operating contractors, the presentation authors and the organizations they represent agree to defend, indemnify and hold harmless ORISE, its officers, employees, consultants and subcontractors, and the DOE from and against any and all claims, losses, liabilities or expenses which may arise, in whole or in part, from the improper use, misuse, unauthorized use or disclosure, or misrepresentation of any intellectual property claimed by others. Such intellectual property includes copyrighted material, including documents, logos, photos, scripts, software, and videos or animations of any type; trademarks; service marks; patents; and proprietary, or confidential information.

Employees of Federal Government agencies and DOE laboratory managing and operating contractors collectively represent and warrant that they have acquired the rights and/or permission for use of all intellectual property, as listed above and claimed by others, that is needed for developing and submitting a presentation file to ORISE for use at the DOE's Vehicle Technologies Office Annual Merit Review Meeting, and to be provided as hand-out materials, and posted on the DOE's website.

Creating Your Presentation Files

- Your presentation is public and will be posted to the DOE Vehicle Technologies Office (VTO) Annual Merit Review (AMR) website.
- You are required to create the following two files:
 - A Microsoft **PowerPoint** file following the instructions and guidelines contained within this PowerPoint template. Acceptable formats for presentations are either .ppt or .pptx
 - Once your PowerPoint presentation is complete, you must create a PDF version of your PowerPoint presentation following the instructions in this document.
- You may design your slides on either a PC or a Mac.
- **Naming your files:** Use the file name that ORAU sent you in your presentation request email to name your electronic PowerPoint and Adobe files:

Proj#_PI LastName_2023_o

Example: ACE002_smith_2023_o

Overall Presentation Structure

- **Primary Presentation:** These are the slides you will actually be presenting.
 - Maximum of 20 slides for 30-minute time slots
 - Maximum of 10 slides for 15-minute time slots
 - Please only include work that has taken place since the 2022 AMR.
- **Technical Backup Slides:** These will be included in the presentation file but are intended to answer questions/provide additional information. These will be posted on the VTO AMR website.
 - Maximum 5 slides
 - Place these slides after the main presentation and separate them with a divider that says, “*Technical Backup Slides.*”
- **Reviewer-Only Slides:** These will not be posted on the VTO AMR website.
 - We do not require reviewer-only slides, but we recommend that you prepare slides to elaborate on issues of interest to the reviewers.
 - There is no limit to the number, but you should limit the number of slides to essential information and not overwhelm the reviewers.
 - Place these slides after any “Technical Backup” slides and separate them with a divider that says, “*Reviewer-Only Slides.*”

Formatting Your Presentation

- **Format:** Use a 16:9 format for your presentation:
 - PC: Design → Slide size → Widescreen (16:9)
 - Mac: File → Page Setup → Slides sized for → 16:9
- **Font:**
 - Do not use proprietary fonts. All fonts in the presentation must be standard across Windows and Mac platforms or information may be lost when creating the Adobe PDF version of your presentation. Use only Arial, Times New Roman, Courier New, Verdana, or Trebuchet MS.
 - Use at least a 12-point font.

Formatting Your Presentation (Continued)

- Ensure there is high contrast between text and background for best readability. We recommend a white background along with black or dark text. Light or gray text is hard to read at a distance so adjust your template accordingly.
- Please remove any copyright indicia from your company template so that your presentation can be posted on the AMR website.
- Spell out acronyms and chemical formulas the first time that you use them.
- Add Alt Text to all graphics, tables, and charts.
- Fill out the Properties box for your presentation.

Adding Images to Your Presentation

- Do not copy/paste images into your presentation.
 - On PC: Insert the image using the “Insert/Picture/File name” menu option of PowerPoint rather than copying/pasting.
 - On Mac: Insert the image using “Insert/Picture/Picture From File” menu option of PowerPoint rather than copying/pasting.
- Crop images in an image processing software instead of PowerPoint. Save the images as an external file (.jpg and .png file formats work well).
- Inserting original images into your presentation works best for preserving image clarity. If originals are not available, it may be an indication the image is copyrighted.

Animations and Videos

- Use animated text and/or figures only if absolutely necessary. Unnecessary animations can distract the audience from your message.
- Be aware that animations do not convert to PDF and animated information may not be visible to reviewers or in the final PDF posted on the VTO AMR website.
- Videos do not translate to PDF reliably and will not be posted on the VTO AMR website.

Content Restrictions

- Your presentation is public and will be posted on the VTO AMR website.
- You must include the phrase “This presentation does not contain any proprietary, confidential, or otherwise restricted information” on at least the first slide (you may put on all slides if you wish).
- Do not include any proprietary or confidential information. It is your responsibility to ensure that any subcontractor information is not proprietary or confidential.
- You must remove the copyright indicia on your company template if that indicia is part of the template; otherwise, we cannot post your presentation on the VTO AMR website.
- Your presentation may **not** include any slide that has “Official Use Only” or “Sensitive” or any similar wording, or information that your organization might construe as being in such categories.
- You must include the phrase “Any proposed future work is subject to change based on funding levels.” on all slides with future-looking statements.

Copyright Restrictions

- If you use any copyrighted information or graphics or intellectual property, it must be properly attributed.
- Do not assume subcontractor information may be used without their approval.
- Do not assume that information or images published on a website can be used without permission.
- If you use copyrighted graphics (including copyrighted photos and journal and magazine covers), you must provide written permission along with your submitted file for it to be accepted by DOE for the purposes of the AMR.
- Intellectual property includes copyrighted material, including documents, logos, photos, scripts, software, and videos or animations of any type; trademarks; service marks; patents; and proprietary or confidential information.
- Also see the indemnification statement on p. 7.

Use of Logos

- **Do NOT** use the DOE logo or seal in your presentation. Some examples include:



- **Do NOT** use the EERE slide template.
- If you use corporate logos for organizations other than your own, secure permission for use.

30- Minute Recommended Slide Order

- Title Slide: must include Project ID, name of principal investigator, name of presenter if different, and “This presentation does not contain any proprietary, confidential, or otherwise restricted information.”
- Overview Slide: must include timeline, budget, barriers, and partners
- Project Objectives
- Milestones (if not included as part of Approach)
- Approach
- Project Accomplishments and Progress
- Collaboration and Coordination Among Project Team
- Market Impact and Sustainability
- Contribution to Energy Equity and Environmental Justice
- Summary Slide

Additional slides after Summary Slide:

- Technical Backup Divider Slide
- Technical Backup Slides
- Reviewer-Only Divider Slide
- Reviewer-Only Slides
 - Publications & Presentations
 - Critical Assumptions & Issues

15- Minute Recommended Slide Order

- Title Slide - must include Project ID, name of principal investigator, name of presenter if different, and “This presentation does not contain any proprietary, confidential, or otherwise restricted information.”
- Overview Slide - must include timeline, budget, barriers, and partners
- Project Objectives
- Approach
- Project Accomplishments and Progress
- Collaboration and Coordination Among Project Team
- Contribution to Energy Equity and Environmental Justice
- Summary Slide

Additional slides after Summary Slide:

- Technical Backup Divider Slide
- Technical Backup Slides
- Reviewer-Only Divider Slide
- Reviewer-Only Slides
 - Publications & Presentations
 - Critical Assumptions & Issues

Preparing your PowerPoint for Web-Publication/PDF

Create your web-ready PDF file (the file that will be published on the VTO AMR website) using the following instructions on the next pages (p. 20-25) to:

- Add Alt Text
- Add presentation detail information
- Create and verify the final PDF

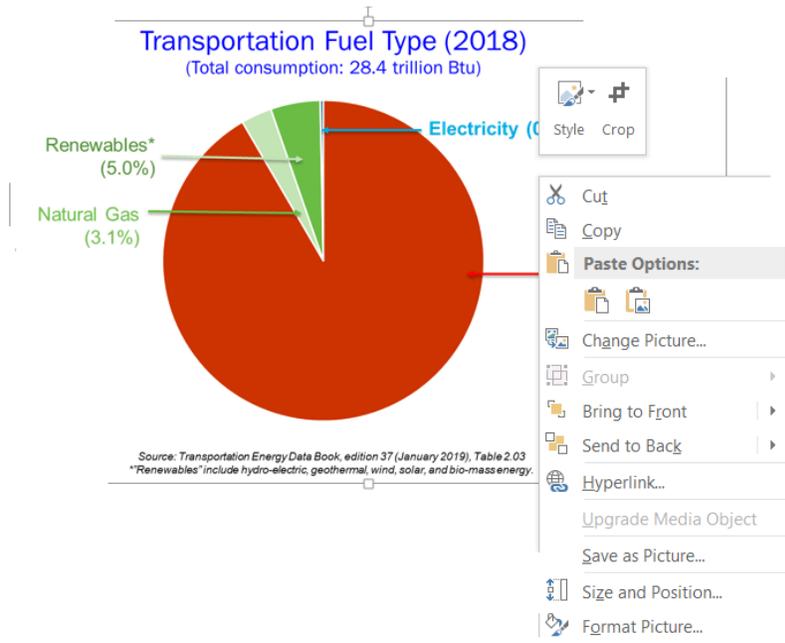
Adding Alt Text to Your Presentation

- You must add alternate text (Alt Text) to key graphics, charts, and tables on each slide.
- Alt Text helps visually impaired people who use screen readers to know what the picture shows.
- Be accurate and succinct. You do not have to say “image of...” or “graphic of...”
- A good Alt-Text example of a picture of a crowd at a basketball game:

“A large, diverse group of cheering students, standing up, and fist-pumping on the bleachers of a basketball game.”

To Add Alt Text to a Chart, Graph, or Image

Note: These instructions are for PowerPoint 2013. If you have a newer version, you may be able to right click on the graph or chart and select "Edit Alt Text" directly from the menu.



1. Right click on the graph or chart and select "Size and Position..."



2. Select the "Alt Text" option and enter the **Title** and a short brief **Description** of the chart

3. Close the Format Picture pane to return to the PowerPoint slide

Adding Presentation Detail Information

- Under the **File** tab, select **Info**
- Click on “**Properties**” and then select “**Advanced Properties**”

On the “**Summary**” tab of the pop-up window, complete the following fields:

- **Title:** Enter the title of your presentation
- **Subject:** Substitute your **Project ID** into the subject
- **Author:** Enter the **PI Name** and **Company**

- **Save preview picture:** Make sure this box is checked
- Press **OK**

The screenshot shows the Microsoft PowerPoint interface. On the left is the File tab ribbon with the 'Info' button highlighted. The main area displays the 'Info' tab for a presentation titled '2021 RD instructions (003) LS (002)'. A 'Properties' dropdown menu is open, showing 'Advanced Properties' selected. A red arrow points from the 'Advanced Properties' option to the '2021 RD instructions (003)_LS_LR.pptx Properties' dialog box. The dialog box has tabs for 'General', 'Summary', 'Statistics', 'Contents', and 'Custom'. The 'Summary' tab is active, showing fields for Title, Subject, Author, Manager, Company, Category, Keywords, Comments, Hyperlink base, and Template. The 'Save preview picture' checkbox is checked. Red arrows point from the instructions to the corresponding fields in the dialog box: 'Oral Presentation Guidelines and Examples' for Title, 'Project ID, 2021 VTO Annual Merit Review' for Subject, and 'Principal Investigator Name, Company' for Author. A red arrow also points from the 'OK' button in the dialog box to the 'Press OK' instruction in the text.

Creating Final Version of Your Presentation

- Once your PowerPoint presentation is final, you must minimize your PowerPoint's file size.
- Do this by using the “**Save As**” option to save the final version of your file as a PowerPoint presentation.
- Doing a simple “Save” command will not minimize file size.
- You can “Save As” an existing PowerPoint filename if needed.

Creating PDF Version of Your Presentation

- You are also required to submit a PDF version of your presentation.
- After saving your PowerPoint file using the “Save As” option, save the file as a PDF using the same naming conventions as your PowerPoint file.
 - If you have Adobe Acrobat Pro software, you can use the Acrobat PowerPoint plug-in or select “Save As Adobe PDF” to create your PDF.
 - If you do not have Acrobat Pro, click “Save As” and select “PDF” from the Save As type menu.
- Click the “Options” button in the Save As window and make sure to check the box to enable accessibility tags. Look for text that says “Document structure tags for accessibility” or “Enable accessibility and reflow with tagged Adobe PDF.”
- Click “Save”.
- Select “NO” if asked if you would like to convert the presentation’s speaker notes to text annotations in the PDF.

Verifying PDF File

After you create the PDF,

- Scroll through the document and look at every page to ensure the PDF matches the PowerPoint file.
- Look for missing items from charts, such as legends and axis titles, which sometimes disappear due to incorrect object reordering that can result from the tagging process for accessibility.
- If you do find issues that you're not able to fix, a communications or publishing specialist at your organization may be able to help. Or, you can contact VTAMR@ORAU.org to help troubleshoot the PDF conversion.

Submitting Your Presentation

- You must submit your presentation files to ORISE no later than **APRIL 14, 2023**.
- Submit your presentation to ORISE by filling out [this Google Form](#).
 - Upload your PowerPoint presentation file (.ppt or .pptx)
 - Upload the PDF version of your PowerPoint presentation (.pdf)
 - Submit any changes to title or presenter. Title changes must be approved in advance by your VTO Technology Manager.
 - If you do not have a Google account associated with your email address, follow the steps on this page: [Create a Google Account - Google Account Help](#)

Oral Presentations

- Additional details on the virtual presentation platform will be communicated closer to the event.
- Each session will have a moderator to enforce time limits and facilitate Q&A. Your mic will be muted once you have reached your time limit.

Presentation Time Limits

- Your oral presentation will be 15 or 30 minutes in length as indicated on your invitation-to-present email from ORAU.
 - For 30-minute time slots:
 - Oral presenters will be allowed 20 minutes for the prepared presentation and updates, and 10 minutes for questions.
 - Oral presentations should contain a maximum of 20 presented slides.
 - For 15-minute time slots:
 - Oral presenters will be allowed 10 minutes for the prepared presentation and updates, and 5 minutes for questions.
 - Oral presentations should contain a maximum of 10 presented slides.

Time limits will be strictly enforced.

- A PDF version of the presentation slides will be available for attendees to download from the VTO AMR website just before the meeting. This PDF will not include PowerPoint animations, videos, or Reviewer-Only slides.

Late Information Addition

- Information and research updates that become available following the submission of the presentation but before the AMR may be supplied verbally at the time of the oral presentation.
- **No extensions will be granted for presentation submission.**
- Any additional information must still adhere to the time limitations.

TI Review Criteria

All TI presentations follow the same content and design guidelines for reviewer scoring.

Criterion	Weight
Project Objectives	20%
Project Approach	20%
Project Accomplishments and Progress	40%
Collaborations and Coordination among Project Teams	10%
Contribution to Energy Equity and Environmental Justice	10%

Consider these criteria and weights when creating your presentation!

Slide Title and Key Results

- **Slide Title:** Except for the mandatory Title, Overview, and Summary slides, all slide titles and headings should relate directly to the evaluation criteria.
- **Key Results:** The key take-home message for each results slide should be communicated as a banner, header, or bullet.

Instructions for Specific Slides

- The following guidelines provide specific information on mandatory slides and the type of information expected within the criteria guidelines. These instructions apply to both poster and oral presentations.
- **Your presentation should include:**
 - **Title Slide** (mandatory)
 - **Overview Slide** (mandatory)
 - **Review Criterion Slides** (mandatory, one or more slides as appropriate for each review criterion)
 - **Summary Slide** (mandatory)
 - **Technical Backup slides** (optional)
 - **Reviewer-Only slides** (optional)

- **The following slides include:**

Instruction

(Guidance for constructing the specific slides and sections)

Example Slide

(Examples are from previous AMR presentations)

- Include:
 - Project title
 - Name of the principal investigator
 - Name of the presenter if different from the principal investigator
 - Organization
 - Project ID# (which ORAU will provide to you)
 - Statement: “This presentation does not contain any proprietary, confidential, or otherwise restricted information.”

Instruction for all oral presentations, unless otherwise noted

2023 DOE Vehicle Technologies Office Annual Merit Review Presentation

(replace with your title)

P. I. Name (always include)

Presenter Name (if not the P.I.)

Organization

Date

Project ID #

(this will be provided to you)

This presentation does not contain any proprietary, confidential, or otherwise restricted information

Western Smart Regional EV Adoption and Infrastructure at Scale – WestSmartEV@Scale

Principal Investigator: James Campbell
Presenter: James Campbell
Organization: PacifiCorp
Presentation Date: June 21, 2022
Project ID: ti128



This presentation does not contain any proprietary, confidential, or otherwise restricted information



www.develop901.com

Advancing Climate and Innovation Goals of Memphis and Shelby County: Electrification of Key Fleet Vehicles to Capture Cost Savings and Climate Benefits

**Leigh Huffman, Principal Investigator
Shelby County Government,
Office of Sustainability and Resilience
June 22, 2022
Project ID: TI135**

This presentation does not contain any proprietary, confidential, or otherwise restricted information.



Mandatory Overview Slide

- Please prepare an Overview slide formatted and containing the information per the following slide:
 - Timeline (please confirm dates with your DOE HQ/NETL manager(s))
 - Budget (please confirm values with your DOE HQ/NETL manager(s))
 - Barriers (please list up to three Technology Integration barriers and targets that this project will address)
 - Partners

Timeline

- Project start date
- Project end date
- Percent complete

Budget

- Total project funding
 - DOE share
 - Contractor share
- Funding for FY 2022
- Funding for FY 2023 (if available)

Barriers and Targets

- List up to three Technology Integration barriers and targets that this project will address

Partners

- Interactions/collaborations
- Project lead

Overview Slide Examples

Overview

Timeline

- Start : October 1, 2020
- End: December 31, 2023
- 40% Complete

Budget

- Total project funding
 - DOE share: \$737,555
 - Cost share: \$828,955
- Total project budget expended (as of 3/31/22):
 - DOE share: \$108,719
 - Cost share: \$157,457

Barriers and Targets

- Limited local experience with Electric Vehicle (EV) fleets and Electric Vehicle Supply Equipment (EVSE) among local shuttle operators, contractors, and utility
- Limited availability of medium-duty transit vehicles in EV models
- Lack of data for analysis of environmental impact and financial costs and benefits

Partners

Tulane University, Entergy, Creative Bus Sales, Southeast Louisiana Clean Fuel Partnership



Project Overview

<h3>Timeline</h3> <ul style="list-style-type: none"> • Project Start Date: October 1, 2020 • Project End Date: December 31, 2023 • Percent Complete: roughly 45% 	<h3>Barriers</h3> <ul style="list-style-type: none"> • Lack of awareness and exposure to electric vehicles (EVs) and charging infrastructure in St. Louis • Unproven financial sustainability of utilizing EVs in the operations of nonprofit social service agencies • Lack of validation that EVs can improve social service delivery
<h3>Budget</h3> <ul style="list-style-type: none"> • Total Project Funding: \$1,032,392 <ul style="list-style-type: none"> • DOE Share: \$500,000 • Cost Share: \$532,392 • Budget Period 1: October 1, 2019-December 31, 2021: \$463,150 <ul style="list-style-type: none"> • Expended: \$338,531 • Budget Period 2: January 1, 2022-December 31, 2022 (expected): \$412,368 	<h3>Partners</h3> <ul style="list-style-type: none"> • Forth, project lead • St. Louis Agency on Aging (SLAAA) • Northside Youth and Senior Service Center • City Seniors, Inc. • North Newstead Association • Ameren • AmpUp • St. Louis Regional Clean Cities Coalition • General Motors • Delivery Associates



OVERVIEW

www.develop901.com

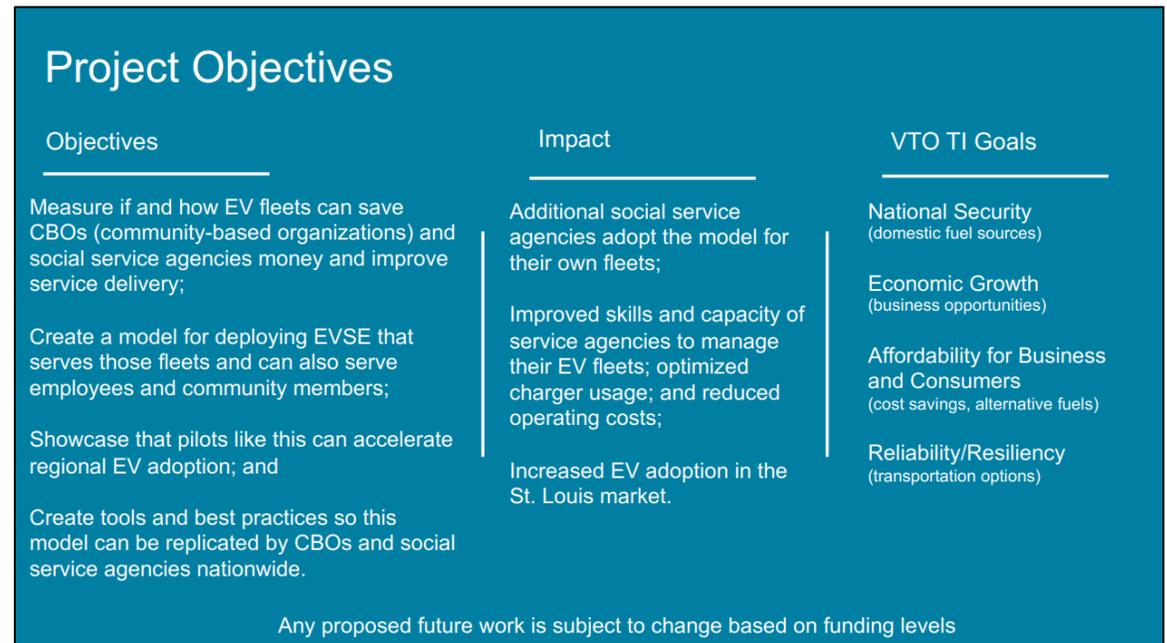
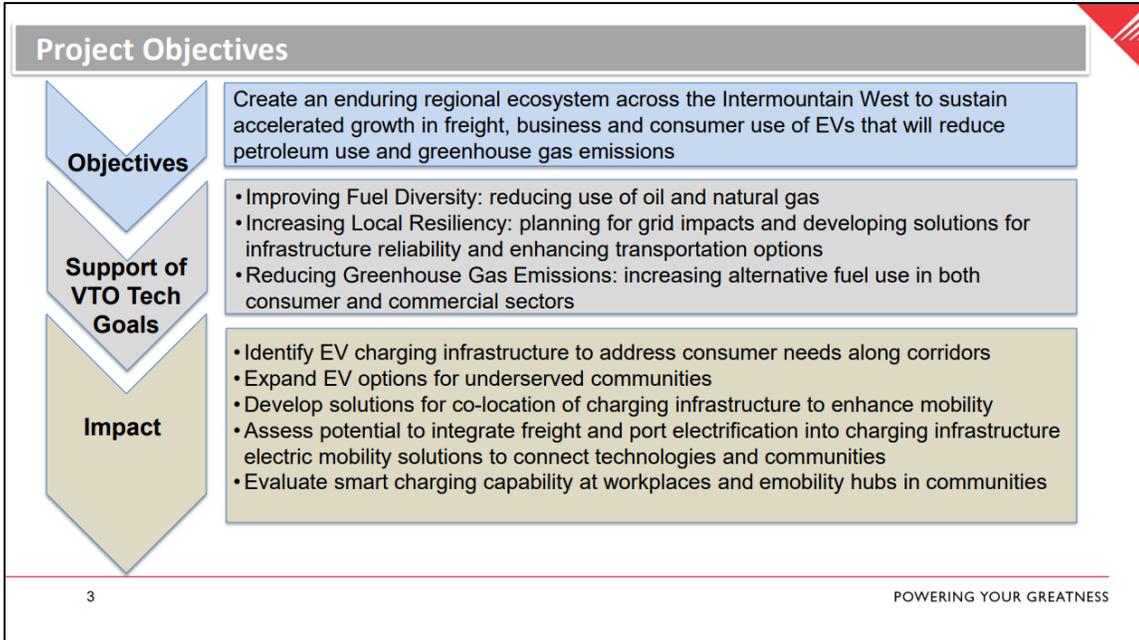
<h4 style="background-color: #4f7942; color: white; padding: 2px;">Timeline</h4> <ul style="list-style-type: none"> • Start: October 1, 2020 • End: December 31, 2023 • 34% Complete 	<h4 style="background-color: #4f7942; color: white; padding: 2px;">Barriers Addressed</h4> <ul style="list-style-type: none"> • Lack of EV technology present in Shelby County's fleet. • Limited research on which EVs will meet organizational needs. • Lack of data to determine cost effectiveness and scalability within Shelby County's fleet. 		
<h4 style="background-color: #4f7942; color: white; padding: 2px;">Partners</h4> <ul style="list-style-type: none"> • Shelby County Roads, Bridges, & Engineering Department • East Tennessee Clean Fuels • Memphis Light, Gas & Water • Ford Motors (Lonnie Cobb Ford) 	<h4 style="background-color: #4f7942; color: white; padding: 2px;">Budget</h4> <table style="width: 100%; border: none;"> <tr> <td style="width: 50%; border: none;"> <ul style="list-style-type: none"> • Total Project Funding: \$1,004,024 • DOE Share: \$500,000 • Cost Share: \$504,024 </td> <td style="width: 50%; border: none;"> <ul style="list-style-type: none"> • Budget Period 1: \$58,909 • Expended: \$25,988 • Budget Period 2: \$857,684 • Expended: \$6,802 • Budget Period 3: \$87,431 </td> </tr> </table>	<ul style="list-style-type: none"> • Total Project Funding: \$1,004,024 • DOE Share: \$500,000 • Cost Share: \$504,024 	<ul style="list-style-type: none"> • Budget Period 1: \$58,909 • Expended: \$25,988 • Budget Period 2: \$857,684 • Expended: \$6,802 • Budget Period 3: \$87,431
<ul style="list-style-type: none"> • Total Project Funding: \$1,004,024 • DOE Share: \$500,000 • Cost Share: \$504,024 	<ul style="list-style-type: none"> • Budget Period 1: \$58,909 • Expended: \$25,988 • Budget Period 2: \$857,684 • Expended: \$6,802 • Budget Period 3: \$87,431 		

Any proposed future work is subject to change based on funding levels.

Project Objectives

- Project Objectives count for 20% of your total project score.
- These slide titles should clearly link to your **Project Objectives**.
- Information to include:
 - Describe the **objectives** of your project and what you were to achieve in the time period covered by this presentation
 - Describe how your project supports the following VTO **Technology Integration goals** (only note those that are applicable):
 - Improving fuel diversity
 - Increasing local resiliency (infrastructure reliability, diverse/resilient fueling, and transportation options)
 - Reducing greenhouse gas emissions (through increasing alternative fuel use and transportation efficiency)
 - Describe the **impact your project has on addressing the barriers identified in the Overview slide** and other specific targets and milestones

Objectives Example Slides



Project Approach

- Project Approach counts for 20% of your total project score.
- The title of your slides should make it clear that they count toward **Project Approach**.
- Describe overall Approach for achieving the **objectives** of improving fuel diversity, increasing local resiliency, and reducing greenhouse gas emissions through increasing alternative fuel use and transportation efficiency. Be sure to indicate if this project will collect/share objective data & lessons learned that can inform future research needs and provide insights to local communities and stakeholders.
- Describe the overall approach for your project (phases of work, etc.)
- **List specific tasks from your Statement of Project Objectives and/or Annual Operating Plan**
- Emphasize unique aspects of your work
- Describe how your project is linked to other R&D or Technology Integration projects within the VT Office and/or other federal agencies (if applicable)
- Use simple statements so that lay-people, not experts in your area, can readily understand the explanation of your approach.
- Include the planned milestones and go/no-go decision points for FY 2023 and FY 2024 and current status toward them, as applicable.

Approach Example Slides

Project Approach

BUDGET PERIOD 1

Procurement & Infrastructure Upgrades

- Confirm EV shuttle selection and place purchase order
- Design infrastructure upgrades
- Bid & award construction contract
- Site construction & electrical service installation
- EV shuttles fleet accessory upgrades at local dealer
- EV shuttles fleet ready for service

BUDGET PERIOD 2 (2022)

Initial Deployment & Data Collection

- EV Shuttles begin service on regular routes
- Review of initial data and sharing protocols
- Presentations at local Clean Cities events
- EV Charging Infrastructure Case Study

BUDGET PERIOD 3 (2023)

Data Analysis & Outreach

- Website published featuring Case Study 1, presentations, and workshop information
- On-campus workshop for area fleet managers
- Presentations at local Clean Cities events
- Case Study focusing on Operational Experience
- Financial Analysis with Carbon Pricing

Tulane University

Project Approach

Budget Period 1 (Oct. 2020 - Dec. 2021): Project Initiation and Launch

- Initiation and Operations Planning
- Clarifying Fleet Requirements
- Establish Site Locations
- Secure Vehicles
- Source and Install Charging Stations
- Site Preparation
- Staff Training and Education
- Launch Program
- Data Management Planning
- Implementation of Public Use of Chargers
- Host Regional Workshop
- Introduce Project at Conferences and Workshops

Budget Period 2 (Jan. 2022 – Dec. 2022): Project Refinement

- Present on initial Project Findings
- Host Regional Workshop
- Project Refinement
- Educational Sessions with Other Fleets
- Identify Clean Cities Coalitions for Technical Assistance

Any proposed future work is subject to change based on funding levels

Approach

Budget Period 1:

Begin project & Ramp-up of Priority Area Efforts

- ✓ Engage PAC – start regular PAC meetings
- ✓ Begin pulling together statewide partners
- ✓ Develop statewide effort website
- ✓ Develop state's "Roadmap" or "Guide" that includes goals
- ✓ Develop and refine templates for outreach

BP 1

Budget Period 2:

Continuation of Priority Area Efforts

- ✓ Conduct utility, government, dealer and fleet engagements
- ✓ Begin gap and community charging analysis and planning
- ✓ Continue statewide initiative development

BP 2

Budget Period 3:

Final Completion of Efforts & Project Wrap-up

- ✓ Complete work across all Priority Areas
- ✓ Develop the *Replication Playbook*

BP 3



www.DriveElectricUSA.org

Milestones

- Milestones may be presented in a separate slide directly after the Approach section or included as part of the Approach section.
- Include milestones and go/no-go decision points for FY 2023 and FY 2024.

Milestones Slide Examples

www.develop901.com



MILESTONES

	Milestone	Type	Description	Progress
Budget Period 1	Vehicles are acquired and assigned to work schedules	Technical	100% of vehicles are acquired.	65% Complete
	Site selection for charging stations	Technical	Site plans for charging infrastructure developed and approved and in compliance with the Unified Development Code.	90% Complete
	Charging infrastructure installation	Technical	Installation of ≥50% of charging infrastructure is complete and equipment is verified to be functional.	17% Complete
	Vehicle use aligning with intended use and contributing to fleet needs	Go/No-Go	Assessment of whether or not the vehicles adequately meet the needs of their intended use is completed.	50% Complete
Budget Period 2	Staff training	Technical	Employee training related to alternative fuel technologies is complete.	10% Complete
	Charging infrastructure installed	Technical	100% of infrastructure is installed.	Not started
	Identify key data points needed	Technical	Data requirements are identified and listed along with initial data in each of the identified categories (such as vehicle miles driven, fuel consumption, electric charging practices, etc.).	40% Complete
	Collect and summarize data	Go/No-Go	Data are organized into database or spreadsheet as necessary. Data are utilized in generating summary statements and evaluating for project's impact on costs.	Not started

Any proposed future work is subject to change based on funding levels.

Approach – Milestones

All milestones are "Technical" except for those in darker gray at bottom of BPs 1 and 2 that are "Go/No Go".

BUDGET PERIOD 1 <i>(Oct. '20 – Dec. '21)</i>	BUDGET PERIOD 2 <i>(Jan. '22 – Dec. '22)</i>	BUDGET PERIOD 3 <i>(Jan. '23 – Dec. '23)</i>
Subrecipients coalition contracts executed ✔	State gap analysis and plans for EV charging finished	1,000 citizens per state educated
Training Manual for local chapters finished ✔	Regional EV charging plan per state completed	100,000 media impressions & 500 direct engagements/state
Framework for EV gap analysis & plans completed ✔	Local & State policy plans completed	State-based EV fleet fact sheets completed
Community EV charging template finished ✔	Web-based platform for EV dealers up and running	Replication Playbook completed
Replication Framework completed ✔ Go/No Go	Secure preferred EV dealers Go/No Go	



www.DriveElectricUSA.org



Project Approach: Milestones		
	Type	Progress
Modeling, Planning and Design Milestones		
Heavy duty fleet data agreements in place to collect information	Technical	Achieved
Destination gap analysis: Report on National Parks and recreation gap analysis	Technical	Achieved
75% of projects passed modeling, analysis & design; >5 Direct-current fast charger (DCFC) and 100 L2 chargers installed across sub-projects	Go/No Go	Achieved
Expansion Phase Milestones		
Surveys developed with IRB approval	Technical	Achieved
Install 15 DCFC chargers as part of charger installation	Technical	Achieved
Data collection in process on subprojects	Technical	In Progress
Report on EV training and career opportunities for underserved community	Technical	In Progress
Analyzed data of >50 TNC drivers, analyzed performance of eCar share and evaluated grid impacts of smart charging from >5 e-buses	Go/No Go	In Progress
Outreach and Education Milestones		
Develop outreach & education plan	Technical	In Progress
Report on project roll-out plans at scale	Technical	In Progress
Host workshops in each of the participating communities presenting best practices in each focus area	Technical	In Progress
Develop best practices for adoption at scale, reflect 30% adoption levels	Technical	In Progress

Project Accomplishments and Progress

- Project Accomplishments and Progress count for 40% of your total project score.
- The title of these slides should make it clear that they address **Project Accomplishments and Progress**.
- Each slide should include a summary “take-away” message, especially those that contain data.
- Describe the most important accomplishments achieved during this reporting period and their significance (from the project’s last review to date for existing projects, or progress to date for new projects).
- Include relevant data to support your accomplishments.
- Relate the accomplishments to project milestones, barriers, objectives, and Technology Integration targets.

Project Accomplishments and Progress (Continued)

- Indicate no more than one slide on previous accomplishments and **CLEARLY indicate work presented at previous AMRs versus new work** (n/a if first-time project is being presented).
- To assist the reviewers evaluating your work, please include bullet comments of the key points on each slide.
- Include sufficient slides to explain what was done leading to the accomplishments.
 - Limit your slides to the time you have available - **the 20-minute and 10-minute presentation times will be STRICTLY enforced** for the 30-minute and 15-minute time slots respectively!
- Though your presentation will be in color, it is best to choose colors and data symbols that can be easily distinguished in black and white for those reviewers using hardcopies.



www.develop901.com

PROJECT ACCOMPLISHMENTS: Held EV Demonstrations

- Hosted EV owners in the Memphis-area at the RBE facility.
- The project team and representatives from MLGW, East Tennessee Clean Fuels, and other Memphis and Shelby County divisions attended the demonstrations.
- Teslas & Nissan Leafs at the Dec. 2021 event.
- Mach-Es at the Jan. 2022 event.
- The events allowed inspectors to test drive, learn, and provide feedback on whether the vehicles would meet their needs.



Image via Jonathan Overly, East Tennessee Clean Fuels

Accomplishments & Progress

Intermodal Hub

Stacking of loads "worst case" particularly for low utilization

Conduct Cost Benefit Analysis for co-location

Charging infrastructure co-location can reduce costs

Notable Equity Considerations

POWERING YOUR GREATNESS

This presentation does not contain any proprietary, confidential, or otherwise restricted information

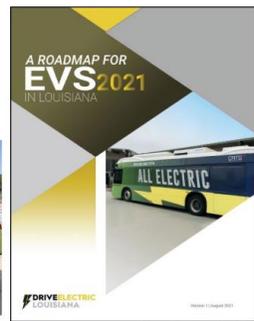
Accomplishments & Progress – Examples: Louisiana

Louisiana Clean Fuels has developed an exceptional **Advisory Board for Drive Electric LA** that has diverse state government, major utility and other vested-entity involvement. They also developed a great "Roadmap for EVs in Louisiana" that addresses all of the categories of barriers that the project is working to address.

1. Joy Johnson, LA Dept. of Transportation & Dev. (DOTD)
2. Dawn Sholmire, DOTD
3. Kevin Reed, DOTD
4. Scott Barrios, Entergy
5. Bliss Higgins, LA Dept. of Environmental Quality (DEQ)
6. Maggie Broussard, CLECO
7. Hugo Capdeville, CLECO
8. Ed O'Brien, LA Dept. of Natural Resources (DNR)
9. Dave Schaller, NA Council for Freight Efficiency
10. Dave Aasheim, Freewire
11. Marin Stephens, New Orleans RPC
12. Terrence Chambers Univ. of Louisiana, Lafayette
13. Carlos McCloud, FHWA
14. Jeff Cantin, Solar Alternatives
15. Jeff Thigpen, SWEPCO
16. Sooraz Patro, CRPC



Drive Electric Louisiana leadership with Governor John Bel Edwards.



www.DriveElectricUSA.org

Collaboration and Coordination among Project Team

- Collaboration and Coordination with Project Team count for 10% of your total project score.
- The title of these slides should make it clear that they count toward your **Collaboration among Project Team**.
- List your project collaborators, indicating:
 - Relationship (for example, prime, sub, etc.)
 - Industry, university, National Laboratory, community stakeholder, etc.
 - Within or outside VTO
 - Extent of the collaboration
- Describe the mix of expertise among team members and its impact on your project.
- Describe contact, interaction, coordination, and communication among project partners.
- Describe contact, interaction, coordination, and communication with VTO.

Collaboration Slide Examples

Collaboration & Coordination Among Project Team

Lead Organization
PacifiCorp, a Berkshire Hathaway Energy Company

Partner Organizations (subrecipients)
Utilities: NV Energy, Idaho Power, Arizona Public Service
Clean Cities: Utah, Yellowstone (ID and WY), Treasure Valley (Boise), Valley of the Sun (Phoenix), Columbia-Willamette (Portland)
Additional Partners: Utah State University, University of Utah, National Renewable Energy Lab, Rocky Mountain Institute, Doglatin, Flexcharging, Forth Mobility, GIV, Park City, Leaders for Clean Air

Community Partners
 Utah Transit Authority, Utah Inland Port Authority, Salt Lake City International Airport, Utah Department of Transportation, Packsize

- PacifiCorp/USU led Bi-weekly program management calls
- Bi-weekly calls with each task area team
- Quarterly entire team meetings with presentations from sub-project teams



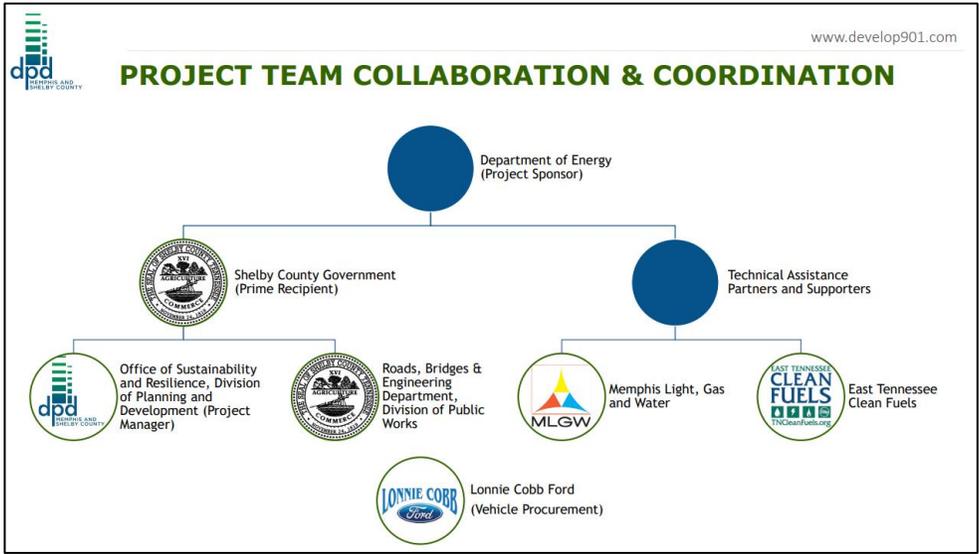
POWERING YOUR GREATNESS

This presentation does not contain any proprietary, confidential, or otherwise restricted information

Collaboration and Coordination among Project Team

St. Louis Area Agency on Aging	The St. Louis Area Agency on Aging (SLAAA) provides a comprehensible and coordinated system of community-based services for older adults in the City of St. Louis. They are key in data tracking and providing payments to the participating social service partners.
St. Louis Regional Clean Cities Coalition	St. Louis Regional Clean Cities Coalition bring their expertise in stakeholder engagement and a vast network of regional and national connections. They are assisting in sharing out progress and best practices of the project identifying and providing technical assistance to three additional Clean Cities Coalitions.
AmpUp	AmpUp is an electric vehicle charging station software company and network provider. They procured the charging stations for SILVERS from EV Box, and provide the software platform for managing charging station utilization data.

Any proposed future work is subject to change based on funding levels



Contribution to Energy Equity and Environmental Justice

- Contribution to Energy Equity and Environmental Justice counts for 10% of your total project score.
- The title of these slides should make it clear that they address **Contribution to Energy Equity and Environmental Justice**.
- Highlight how the project will contribute to energy equity and environmental justice by describing how it benefits underserved and overburdened communities and does not cause increased burdens to these communities.
- If applicable, describe how your project will be sustainable beyond the period of performance.
- Explain what you plan to do during the rest of this year (FY 2023) and next year (FY 2024).
- Highlight the key remaining challenges and barriers to meeting the project objectives.
- If applicable, discuss how your project idea could be replicated in other geographic areas or with other technologies.
- **Be as specific as possible; avoid blanket statements.**

Contribution to EEJ Slide Examples

Contribution to Energy Equity and Environmental Justice

Project Location: North St. Louis

Initial Demographics Being Served:

- The highest percentage of clients served, 42% of the rides provided, were provided to persons aged 65-74 (see the age report).
- 7 clients over age 84 received rides.
- 74% of clients served are female (see Gender report).
- 79% of clients served are African American.
- The average client served is a low-income African American woman in the 65-74 age range living in North City.
- 7,933 lbs of CO2 saved, also no tailpipe emissions



Any proposed future work is subject to change based on funding levels

Contribution to Energy Equity and Environmental Justice

WestSmartEV@Scale is having a direct benefit to underserved and overburdened communities thru the following subprojects:

EV Training: is focused on expanding EV skills in underserved communities

eCarshare@Affordable Housing: is expanding EV options in underserved communities

Intermodal Hub: is located within an underserved community. Expanding zero emissions mobility solutions directly benefits the community

TNC EV Study: is helping TNC drivers transition to EVs, since many of the drivers reside in underserved communities this subproject is beneficial

UT Inland Port Heavy Duty Electrification: the inland port authority is located within an underserved community and is adjacent to other underserved communities. Expansion of the Inland Port will result in increased heavy-duty trucking and associated emissions. Transitioning the heavy-duty vehicles to zero emitting is critical for these communities.

POWERING YOUR GREATNESS

This presentation does not contain any proprietary, confidential, or otherwise restricted information

Contribution to Energy Equity & Environmental Justice

This project started in 2020 before energy and environmental justice (EEJ) concerns and foci were being included in new DOE proposals and received projects. However, this project included the idea that all citizens in each state need to have the chance to participate in transportation electrification learning, EVSE planning, grant applications, partnerships development and EV adoption.

- ✓ **Rural Outreach** – Due to the nature of the need for each state to create an *inclusive, statewide partnership*, rural communities are the most obvious inclusion in our project as part of underserved communities in each state.
- ✓ **Chapter Development** – Almost all states are taking a chapter development approach that *includes not just urban areas and their bedroom counties but all of the counties in a region of the state*. States now need to ensure they consider how to invite underserved community members and be as inclusive as possible in activities that take place in chapters, including working to showcase lower-cost EVs in their events.
- ✓ **Limited-income, BIPOC, LGBTQIA+ Inclusion** – While these types of EEJ were not singled out for foci in the project, all of the Clean Cities coalitions are ramping up efforts to ensure our *entire operations* are more inclusive to all community members in our states, including our efforts in this project.



"Drive Electric Tidewater" in VA (above), and the three large chapters that Louisiana is building (below) are examples of chapters that rural inclusive.



www.DriveElectricUSA.org

Mandatory Summary Slide

- Summarize the key points you wish the reviewers and the audience to take away from your presentation.

Summary Slide Examples

Summary

GOAL	<ul style="list-style-type: none"> Expand use of EVs in transit fleets
APPROACH	<ul style="list-style-type: none"> Deployment of EV shuttles and EVSE by Tulane University to serve existing shuttle routes and services Collection, analysis, and sharing of cost data and overall experience
ACCOMPLISHMENTS	<ul style="list-style-type: none"> Design and construction of five-bay EV charging area Procurement of EV shuttles in fluid business environment Utility gained experience with EV customer needs
UP NEXT <i>Any proposed future work is subject to change based on funding levels.</i>	<ul style="list-style-type: none"> Installation and commissioning of chargers Update implement bus and site graphics Arrival of EV shuttles in December 2022 Commencement of training, operation, and data collection Publication of initial case study


www.develop901.com

SUMMARY

OBJECTIVE:

- Implement a small-scale EV pilot program and lay foundation for future EV expansion in the Shelby County fleet.

PROJECTED OUTCOMES:

- Project will improve fuel diversity, increase local resiliency, and reduce greenhouse gas emissions.

APPROACH:

- Procure a variety of vehicles and install charging infrastructure.
- Collect and analyze data.

MAJOR ACCOMPLISHMENT:

- PO issued for Shelby County Government's first EV.

NEXT STEPS:

- Complete vehicle procurement.
- Install charging stations.
- Begin collecting data to determine cost-effectiveness.

Any proposed future work is subject to change based on funding levels.

Summary

- The project is off on good footing.** All states have begun (or are continuing their) expansion work in their states to more fully develop their statewide, branded partnerships.
- Chapter development has begun.** We know that more chapters enables greater EV education across families, communities, and states. This is a critically important element of the project, and all states are ramping up the development of chapters in their states.
- Efforts are ramping up across the rest of the Priority Areas.**
 - ✓ Utility, Auto Dealer and State & Local Government Official engagements are up across all states.
 - ✓ Fleet discussions about EVs are almost exponentially growing.
 - ✓ *Charging Infrastructure & Planning will start in earnest in Year 2.*

Directly engaging consumers and fleets is a top prime driver for expediting EV adoption. Add utilities, legislators and other government officials into the mix and you have a recipe for REALLY accelerating cleaner, more efficient and resilient transportation in the USA.







19

Technical Backup Slides

Instruction

- Please include a “divider” slide if you are including backup technical slides (**maximum of five**).
- These optional backup technical slides will be available for your presentation and will be included in the web PDF files released to the public.

Reviewer-Only Slides

Instruction

- These optional slides may be included in your submission but will **not** be part of your oral presentation – they will be provided to reviewers only. These optional slides will be removed from the presentation file and the web PDF files.
- Precede these slides with a divider slide marked “Reviewer-Only Slides”.

Publications and Presentations

- List any publications and presentations that have resulted from work on this project.
- Use at least 12-point font.
- Please verify that the links in your slides are active.

Note: This slide is for reviewers only; it is not to be presented as part of your oral presentation. These Reviewer-Only slides will be included in the copy of your presentation that will be made available to the reviewers.

Critical Assumptions and Issues

- Address three to five critical assumptions and/or problems affecting the outcome of your project. Briefly describe the problem as well as potential solutions, both within and beyond the scope of the project.
- Exclude funding issues.

Note: This slide is for reviewers only; it is not to be presented as part of your oral presentation. These Reviewer-Only slides will be included in the presentation file made available to reviewers.

Questions?

Contact us by email:
VTAMR@ORAU.org